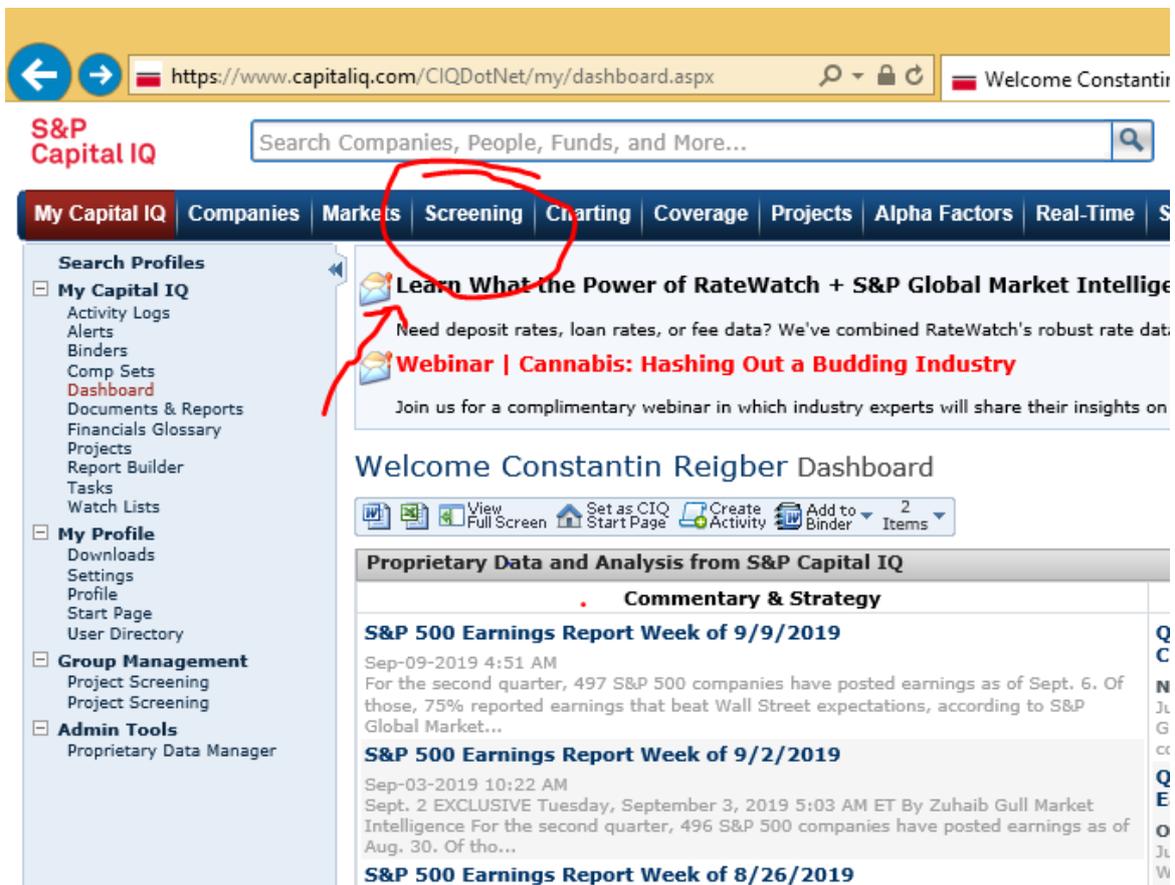


Capital IQ – How to?

How to download Data using the Capital IQ website?

Introduction: In this example, I want to download firm data. My dataset consists of US firms in the banking sector and should include the following information: Company Name, Senior Debt, Total Debt, Total Assets for the Sample period 2000Q1 – 2005Q4 quarterly by fiscal year.

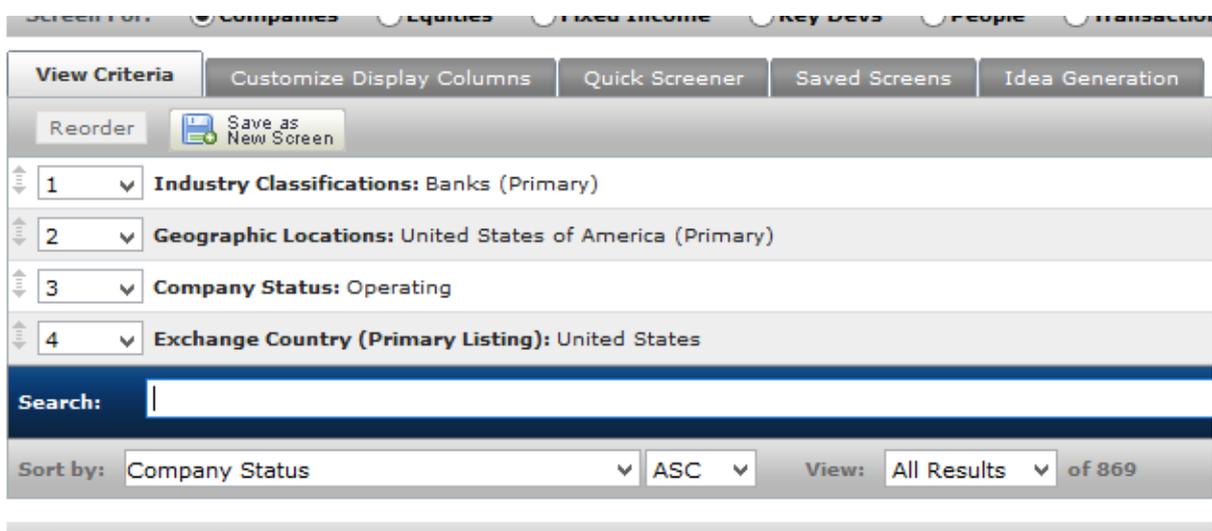
1. In order to download data, click on “Screening”.



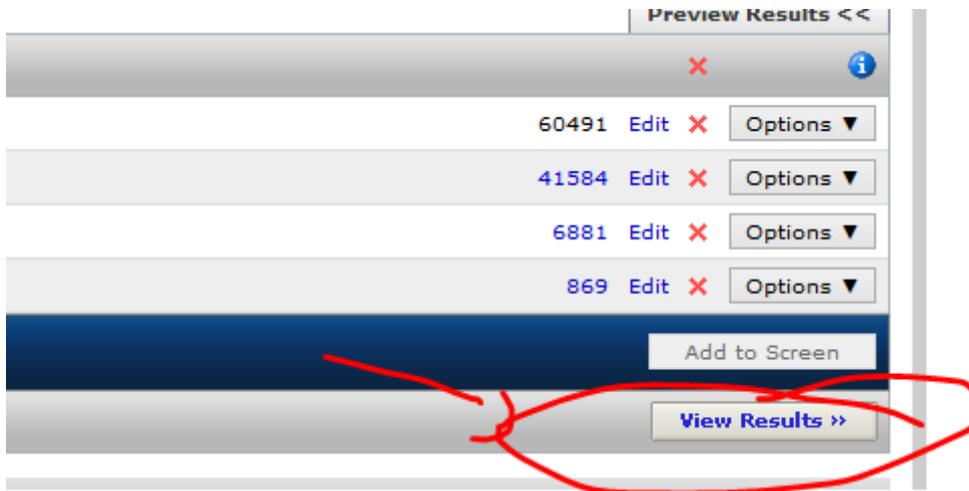
The screenshot shows the S&P Capital IQ website dashboard. The browser address bar displays the URL: <https://www.capitaliq.com/CIQDotNet/my/dashboard.aspx>. The page header includes the S&P Capital IQ logo and a search bar. The main navigation menu is visible, with the 'Screening' tab highlighted by a red circle. Below the navigation menu, there are several promotional banners, including one for 'Learn What the Power of RateWatch + S&P Global Market Intelligence' and another for a 'Webinar | Cannabis: Hashing Out a Budding Industry'. The dashboard content area displays 'Welcome Constantin Reigber Dashboard' and a section titled 'Proprietary Data and Analysis from S&P Capital IQ'. This section includes a 'Commentary & Strategy' table with entries for 'S&P 500 Earnings Report Week of 9/9/2019', 'S&P 500 Earnings Report Week of 9/2/2019', and 'S&P 500 Earnings Report Week of 8/26/2019'. A left-hand sidebar contains various navigation options such as 'My Capital IQ', 'My Profile', 'Group Management', and 'Admin Tools'.

2. Now you can choose from the different categories of data. (hint: move the mouse over the category to see a short description). As we want firm data we choose “Company Screening”.

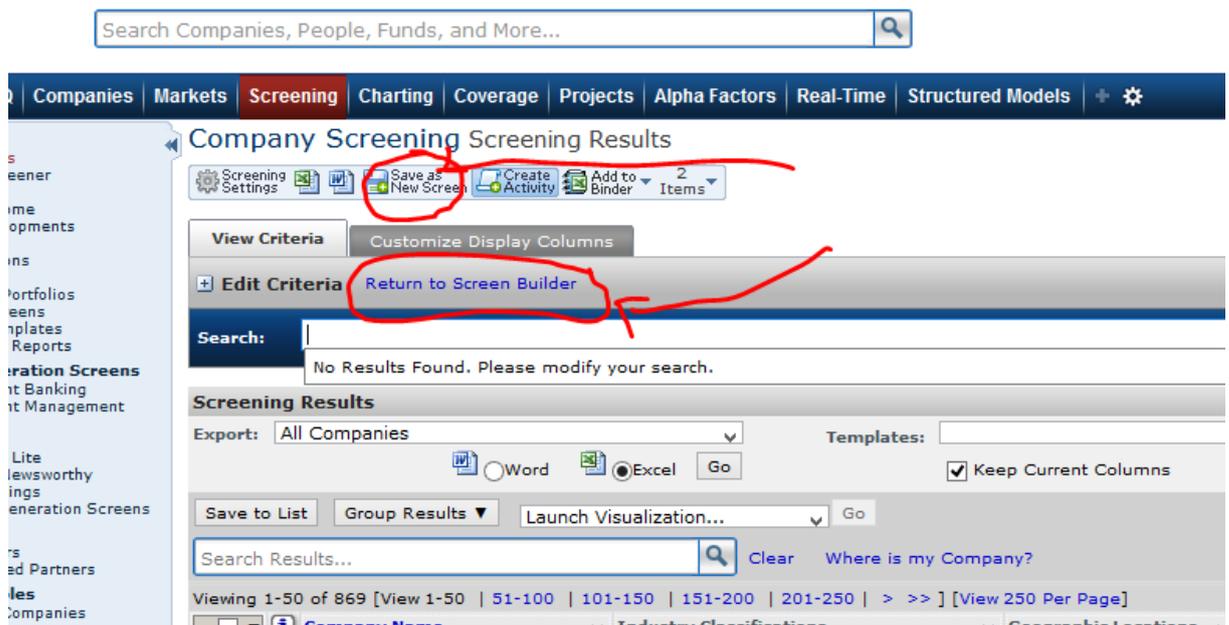
3. The first thing we have to do is specify a list of companies. To do so you can filter all the available companies by the criteria listed on the page. More precise you have to select a specific criterion and click on “Add Criteria”. By adding a criterion, you restrict all the available data in your category to the observations, which fulfill this specific set of criteria. In my example, I only have to filter for the “Industry Classifications” and the “Geographic Locations”:



4. After selecting all the criteria you want, click on “View Results” on the right hand side to preview your data set and further customize it.



5. If you are not happy with your results, you can go back to the criteria selection by clicking on “Return to Screen Builder”. Furthermore, you can also save your search query by clicking on “Save as New Screen”.



6. If you are happy with the firms in your data set than you can proceed and add more columns to your data set with information like total debt. To do so you have to click on “Customize Display Columns” and then on “Browse All Display Columns”.

Company Screening Screening Results

Screening Settings Save as New Screen Create Activity Add to Binder 2 Items

View Criteria **Customize Display Columns** Hide Display Columns Browse All Display Columns

Reorder Save To Template Templates: [Dropdown] Go

- 1 Industry Classifications
- 2 Geographic Locations
- 3 Company Status
- 4 Exchange Country (Primary Listing)

Search: [Input Field]

Sort by: Company Status ASC View: All Results of 869

Screening Results

Export: All Companies Templates: [Dropdown]

Word Excel Go Keep Current Columns Add/Edit D

Save to List Group Results Launch Visualization... Go

Search Results... Clear Where is my Company?

Viewing 1-50 of 869 [View 1-50 | 51-100 | 101-150 | 151-200 | 201-250 | > >>] [View 250 Per Page]

<input type="checkbox"/>	Company Name	Industry Classifications	Geographic Locations	Company
<input type="checkbox"/>	1867 Western Financial Corporation (OTCPK:WFCL)	Banks	United States of America	Operating
<input type="checkbox"/>	1st Capital Bank (OTCPK:FISB)	Banks	United States of America	Operating
<input type="checkbox"/>	1st Colonial Bancorp, Inc. (OTCPK:FCOB)	Banks	United States of America	Operating
<input type="checkbox"/>	1st Constitution Bancorp (NasdaqGM:FCCY)	Banks	United States of America	Operating
<input type="checkbox"/>	1st Source Corporation (NasdaqGS:SRCE)	Banks	United States of America	Operating
<input type="checkbox"/>	1ST SUMMIT BANCORP of	Banks	United States of America	Operating

7. In my example, I would now use the text search to find my variables. For beginners it might not be the best idea to directly choose from the recommended variables, because then you have to select all options in the text field and furthermore have no definition of the variable. To avoid this take a closer look at the recommended variables. Choose the one that seems to be the most appropriate one for your purposes and memorize the path. For the variable “Total Debt” the first search results seems to be the best. Hence, I memorize “CIQ Financial Statements > Balance Sheet”.

The screenshot shows a search interface with the following elements:

- Four filter categories: 1. Industry Classifications, 2. Geographic Locations, 3. Company Status, 4. Exchange Country (Primary Listing).
- Search bar: "Total debt"
- Sort by: (empty)
- Display Columns: (empty)
- Search Results:
 - Total Debt** (highlighted with a red circle and arrow) - CIQ Financial Statements > Balance Sheet
 - Total Debt/Equity % - CIQ Operating Metrics and Ratios > Leverage and Interest Coverage
 - Total Debt/EBITDA - CIQ Financial Statements > Debt Capital Structure
 - Total Debt/EBITDA - CIQ Operating Metrics and Ratios > Leverage and Interest Coverage
 - Total Adjustments (% of Total Debt) - CIQ Financial Statements > Debt Capital Structure (Open Criterion)
 - Total Debt/Capital % - CIQ Operating Metrics and Ratios > Leverage and Interest Coverage
 - Total Debt to Capital - Credit Health Panel Financials and Ratios > Solvency
 - Total Bank Debt - CIQ Financial Statements > Debt Capital Structure
 - Total Convertible Debt - CIQ Financial Statements > Debt Capital Structure
- Company Statistics: Business Segments, Geographic Segments, Capital IQ Defined Data Points, Intra-Company Ranking, Inter-Company Ranking.
- Credit Ratings: Entity Credit Rating, Entity Credit Rating Date.
- Other sections: Ownership, Active, Resto, Inve, Public Holdings, Takeover Defe, Corporate Govt.

8. Now I manually search for the variable by using the different categories below the text search. Thus, I click on Financial Statements under the category Financial Information and search for “Balance Sheet” data under the category “CIQ Financial Statements”.

The screenshot shows a web interface for selecting financial data. At the top, a search bar is labeled "Search Financial Data Items". Below it, a tree view shows the following categories:

- CIQ Financial Statements** (circled in red)
- Key Financials
- Income Statement
- Balance Sheet** (circled in red)
- Cash And Equivalents
- Short Term Investments
- Trading Asset Securities
- Total Cash & ST Investments
- Accounts Receivable
- Other Receivables
- Notes Receivable
- Total Receivables
- Inventory
- Prepaid Exp.
- Finance Div. Loans and Leases, ST
- Finance Div. Other Curr. Assets
- Other Current Assets. Total

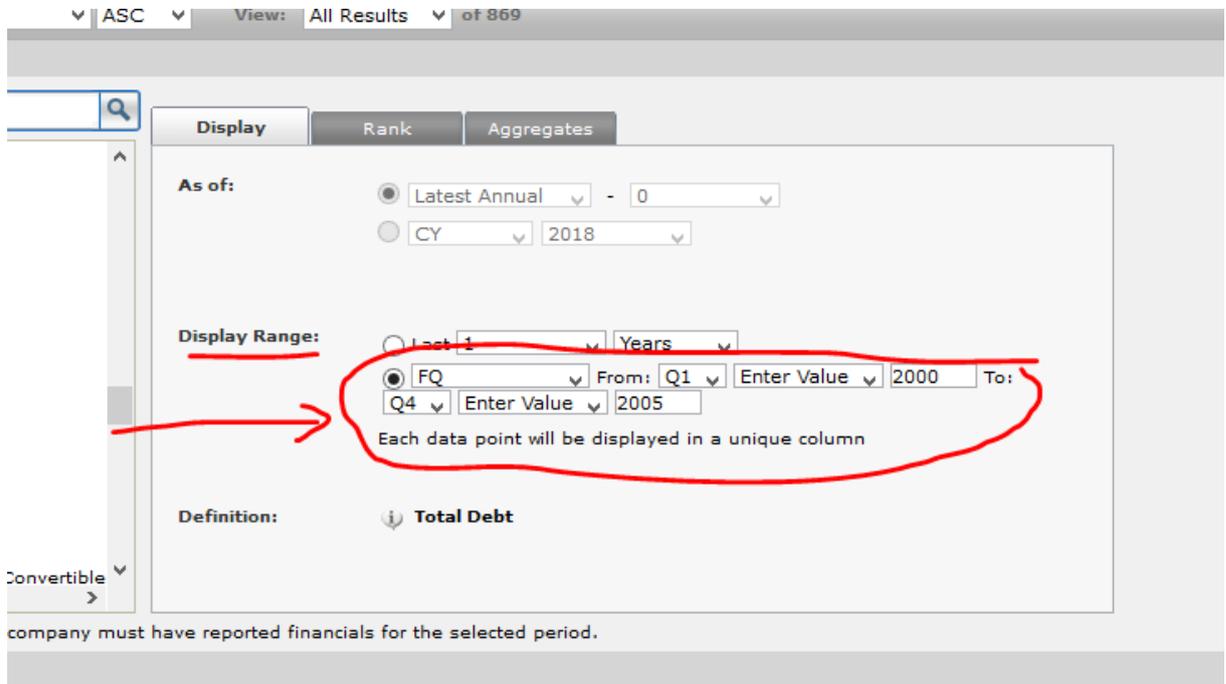
Red arrows point from the "CIQ Financial Statements" and "Balance Sheet" categories to the right. Below the tree view, there are checkboxes for "Set the data point to 0 if it is unreported. The company must have reported financials for the selected period." and "Currency Options".

At the bottom, a "Display Columns" section is visible, with "Financial Information" circled in red. The items listed under "Financial Information" are:

- Financial Statements
- Industry Specific Financials
- Stock Performance/Volume
- Market Partners
- Valuation
- Multiples
- Operating Metrics and Ratios
- Estimates
- Guidance
- Business Segments
- Geographic Segments
- Capital IQ Defined Data Points
- Intra-Company Ranking
- Inter-Company Ranking

Red arrows point from the "Financial Information" category to the right.

9. After I found my variable “Total Debt”, I can choose the time periods for which I want the data. In my example, I click on the second circle under “Display Range” and choose “FQ; Q1 2000 and Q4 2005”.



10. Now I can add the variable to my data set by clicking on “Add Columns” on the right hand side.

11. After adding all my variables, I click on “View Results”. As before you can save the screen or return to the screen builder

to add further things. In my case, I just want to export the data set to excel. Thus, I click on the circle next to the excel symbol and thereafter on “Go”. You may have to download several files as there is a limit to the number of firms in you can download each time.

